Department of
Health Care Services

Request for Personnel Action (RPA)

Business Workflow Automation System

AGENDA

- **System Overview**

- **System Preview**

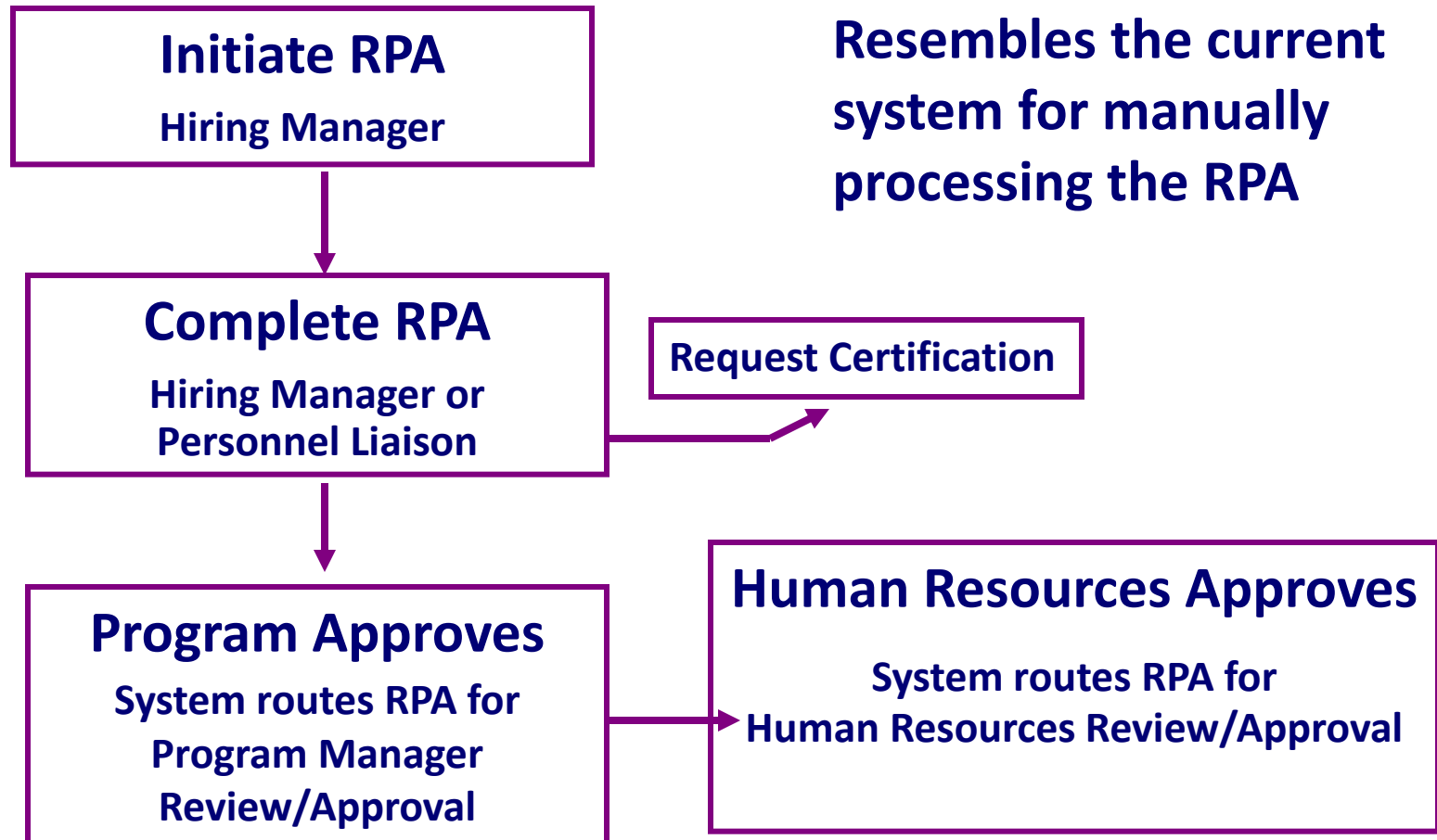- **Pilot and Implementation Plan**

OVERVIEW

The RPA System replaces the existing manual process for RPAs and will automate the creation, routing, and approval of all DHCS RPAs through the following steps:

- **RPA creation**

- **Appointing Program approval**

- **Human Resources Branch (HRB) review and approval**

- **Request for Certification**

- **Budget Office Approval (when required)**

Additional System Features

- Tracks and records elapsed time for each step
- Sends email notice when user action is required
- Allows Word, PDF, and Excel attachments
- Provides reporting capabilities
- Provides security and access based on user's job function

Business Workflow Process

Initiate RPA

Hiring Manager

↓

Complete RPA

Hiring Manager or Personnel Liaison

→ **Request Certification**

↓

Program Approves

System routes RPA for Program Manager Review/Approval

→ **Human Resources Approves**

System routes RPA for Human Resources Review/Approval

Resembles the current system for manually processing the RPA

The RPA System is found on the DHCS Intranet . . .

. . . Using the Business Workflow Automation Portal

There are 5 key areas on the Request for Personnel Action Process screen ….

California Department of Health Care Services

Request for Personnel Action Process

Request for Personnel Action   **Audit Trail**

RPA# (New) XXX17242010

Proposed Appointee:
-
Division/Office:
-
Current Position:
-
-
Proposed Position:

RPA Form

Position Action
Employee Action
Various RPA Entries
RPA Notes
Print RPA

Process Stages

Initiate Process

POSITION ACTION

1. Action Type ☐ Merge   ☐ Promotion in Place
                 ☐ Fill   ☐ Blanket
                 ☐ Refill   ☐ CEA/Exempt
                 ☐ Reclass   ☐ Reorganization
                 ☐ Redirect

    Special Instructions [_____]
    RPA Comments   [_____]

2. Current Position ☐ Conflict of Interest
    Current Position Number [____] - [____] - [____] - [____] - Fraction: [____]
    Current Class Title [_____]
    Tenure [_____]   Time Base [_____]   P/T Fraction [_____]

                                         Get Position Information

5. Current Position Location [_____▼]
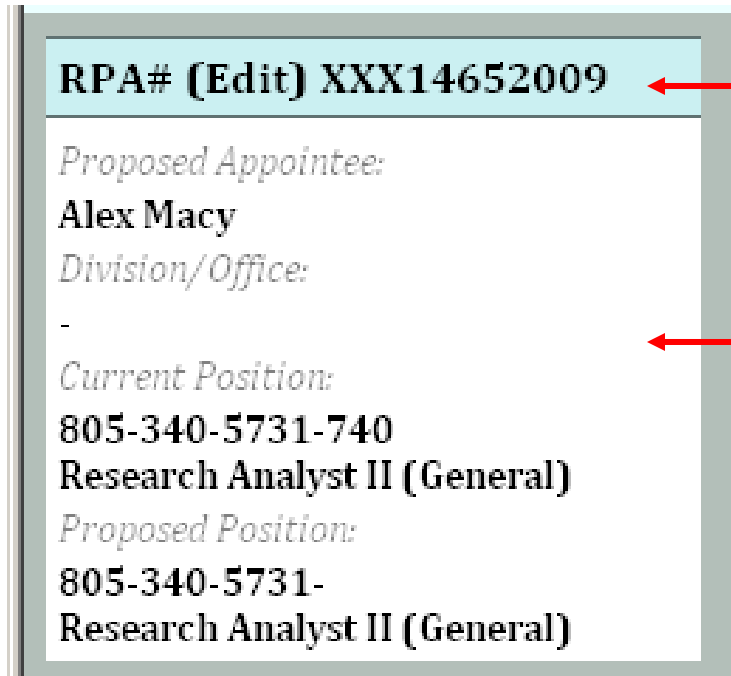
9. Index Code [_____]
    PCA Code   [_____]

Functional Tabs
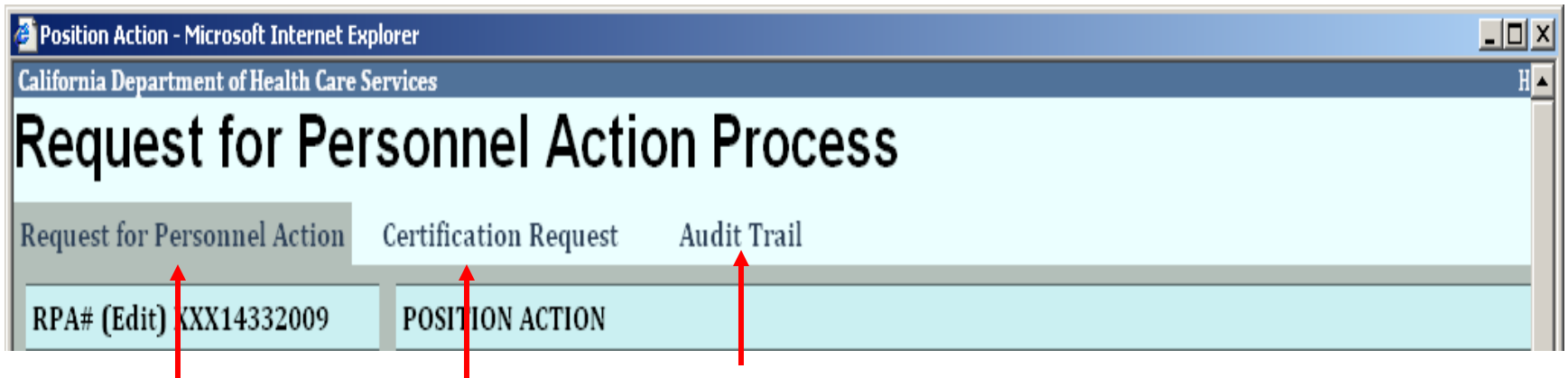
Functional Tabs, located at the top of the screen, are used to navigate between the major areas of the RPA Package.

RPA Summary

RPA# (Edit) XXX14652009

Proposed Appointee:
Alex Macy

Division/Office:
-

Current Position:
805-340-5731-740
Research Analyst II (General)

Proposed Position:
805-340-5731-
Research Analyst II (General)

The RPA Summary located in the upper left corner provides the RPA # and a quick summary of the RPA package.

RPA Form

RPA Form	
Position Action	←
Employee Action	←
Various RPA Entries	←
RPA Notes +	←
Print RPA	

Located directly below the RPA Summary, the RPA Form allows navigation between forms used to complete the RPA package.

Data Entry Areas

The largest area of the screen is used to enter data. This is a basic view of the Position Action Form, which replaces the left side of the current RPA Form (DHCS 3001).

Employee Action

This is a basic view of the Employee Action screen, which replaces the right side of the current RPA Form (DHCS 3001).

The RPA is initiated by the Hiring Manager. . .

Search [ ] GO

Department of
Health Care Services   Business WorkFlow Automation Portal

| **Workflow Desktop** | **Reporting and Process Monitoring** | **Historical Records** | **System Management** |

BWAS UNIT TEST > **Workflow Desktop**

Current Applications

⇨ Initiate RPA

Future Applications

⇨ Future Application 2

⇨ Future Application 3

Selected Filter: [Worklist ▾] **Quick Search:** [All ▾] [   ]

You either have no outstanding Tasks or none of them meet the current 'Quick Search' criteria

. . . Using the Worklist - Hiring Manager and Personnel Liaison collaborate to complete the RPA Package

Initiating an RPA is as simple as selecting an Action Type . . .

California Department of Health Care Services

Request for Personnel Action Process

Request for Personnel Action	Audit Trail

RPA# (New) XXX17292010

Proposed Appointee:
-
Division/Office:
-
Current Position:
-
-
Proposed Position:

RPA Form

Position Action
Employee Action
Various RPA Entries
RPA Notes
Print RPA

Process Stages

Initiate Process

POSITION ACTION

1. Action Type ☐ Merge   ☐ Promotion in Place
                 ☐ Fill   ☐ Blanket
                 ☐ Refill   ☐ CEA/Exempt
                 ☐ Reclass   ☐ Reorganization
                 ☐ Redirect

    Special Instructions [_____]
    RPA Comments   [_____]

2. Current Position ☐ Conflict of Interest
    Current Position Number [____] - [____] - [____] - [____] - Fraction: [____]
    Current Class Title [_____]
    Tenure [_____] Time Base [_____] P/T Fraction [_____]

                                          Get Position Information

5. Current Position Location [_____]

9. Index Code [_____]
    PCA Code [_____]

02-25-2011

16

. . . And routing the RPA to the Personnel Liaison

Audit Trail

The Audit Trail is a valuable system feature . . .

. . . Showing all RPA activities and the elapsed time for each.

AUDIT TRAIL

Audit Trail for RPA: XXX14652009

Underlined headings may be clicked on to sort the column, click again to re-sort in the opposite order

Activity Name	Status	Start Date ▼	Finish Date	Approver	Approver Action
Hiring Manager Review	Completed	11/12/2009 8:38:19 AM	11/12/2009 8:57:27 AM	K2:DHSINTRA\zztestwftSdb2	Send to PL
Personnel Liaison Review	Completed	11/12/2009 8:57:27 AM	11/12/2009 9:00:13 AM	K2:DHSINTRA\zztestwftPLitsd	Return to HM
Hiring Manager Review	Completed	11/12/2009 9:00:13 AM	11/12/2009 9:04:45 AM	K2:DHSINTRA\zztestwftSdb2	Send to PL
Personnel Liaison Review	Completed	11/12/2009 9:04:45 AM	11/12/2009 9:07:21 AM	K2:DHSINTRA\zztestwftPLitsd	Approve
Hiring Manager Approval	Completed	11/12/2009 9:07:22 AM	11/12/2009 9:09:40 AM	K2:DHSINTRA\zztestwftSdb2	Approve
Program Management Approval	Active	11/12/2009 9:09:41 AM	11/12/2009 9:09:41 AM		

Bissell-Benabides, Kathleen (DHCS-UMD-...
Read: RPA Pilot Testing Orientation

Revision: 0.0.0.87

🔳 Start

The Work List shows all RPA packages waiting for your action . . .

The Watch List shows the RPA packages you can monitor and/or track . . .

QUESTIONS?

THANK YOU!